

DAILY MARKET WATCH

20th October 2026

Tuesday

COLOMBO STOCK EXCHANGE

CLOSE OF TRADE

ALL SHARE PRICE INDEX

19,983.78

▼ -75.64 · 0.38%

ASPI YTD -11.67%

SL20 YTD -7.73%

The index slips back below 20,000 as fallers outnumber risers by more than two to one

S&P SL20

5,681.51

-0.34%

TURNOVER, LKR MN

848.48

+24.7% d/d

MARKET CAP, LKR BN

7,224.22

-0.37%

00 MARKET COMMENTARY

TUESDAY · CLOSE OF TRADE

The All Share Price Index fell **0.38%** to **19,983.78**, back below 20,000 and 1.00% under Friday's close after two days of losses. The S&P SL20 fell 0.34% to 5,681.51. The index is 3.98% down on the month and 11.67% on the year, and the RSI reads 30.51, just above the oversold line at 30.

The fall was broad again. 149 securities fell against 57 that rose. The eight contributors carried here are a net -24.39 points, leaving **-51.25** to everything else.

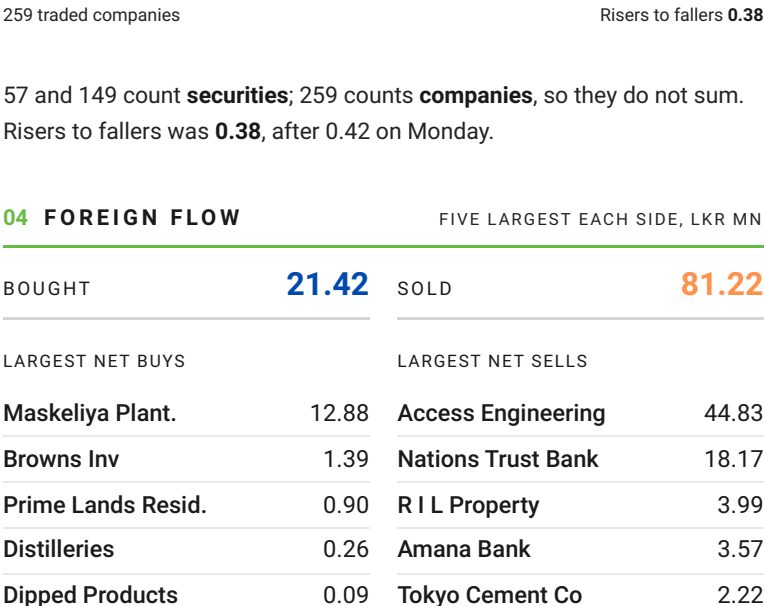
LOLC Holdings' fall of 9.25 to 398.75 accounted for 8.72 points, Dialog Axiata 6.48 and Hatton National Bank 6.19. Kotmale Holdings took 5.80 on LKR 0.13 mn of turnover. C T Holdings, Namunukula and Industrial Asphalts added 8.45 between them.

Turnover rose 25% to LKR 848.48 mn, still 76% below the year-to-date daily average, and LKR 53.53 mn of it was in closed-end funds. Sampath Bank took 18.2%. Three equity crossings, in Sampath, Melstacorp and Access Engineering, were 28.3% of the day.

Foreigners were net sellers: they sold 3.8 times what they bought, for a net outflow of LKR 59.79 mn. Access Engineering was the largest net sale at LKR 44.83 mn and Nations Trust Bank the second at LKR 18.17 mn.

01 MARKET BENCHMARK

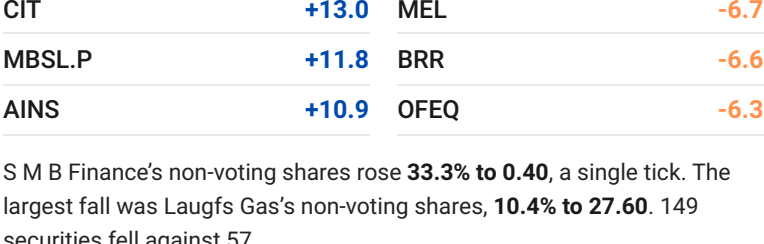
INDEX LEVELS; PATHS REBASED TO COMPARE



Rebased to Wednesday 14 October. The index is **0.95% above** that close, but has given back 201.27 points over the last two sessions.

02 CONTRIBUTORS TO ASPI

INDEX POINTS



Net -75.64 points. The eight shown are a net -24.39, so everything else together took **-51.25**. LOLC Holdings accounts for **-8.72** of the total.

03 MARKET BREADTH

259 TRADED

57 up securities, up against down **149 down**

259 traded companies Risers to fallers **0.38**

57 and 149 count **securities**; 259 counts **companies**, so they do not sum. Risers to fallers was **0.38**, after 0.42 on Monday.

04 FOREIGN FLOW

FIVE LARGEST EACH SIDE, LKR MN

BOUGHT 21.42 **SOLD 81.22**

LARGEST NET BUYS **LARGEST NET SELLS**

Maskeliya Plant. 12.88 **Access Engineering** 44.83

Browns Inv 1.39 **Nations Trust Bank** 18.17

Prime Lands Resid. 0.90 **R I L Property** 3.99

Distilleries 0.26 **Amana Bank** 3.57

Dipped Products 0.09 **Tokyo Cement Co** 2.22

NET OUTFLOW -59.79

Foreigners sold **3.8x** what they bought, for a net outflow of LKR 59.79 mn. Access Engineering was the largest net sale at **LKR 44.83 mn**.

05 TOP MOVERS

PRICE CHANGE, %

GAINERS % **LOSERS** %

SEMB.X **+33.3** **LGL.X** **-10.4**

ASPH **+20.0** **TESS.X** **-7.1**

CIT **+13.0** **MEL** **-6.7**

MBSL.P **+11.8** **BRR** **-6.6**

AINS **+10.9** **OFEQ** **-6.3**

S M B Finance's non-voting shares rose **33.3% to 0.40**, a single tick. The largest fall was Laugfs Gas's non-voting shares, **10.4% to 27.60**. 149 securities fell against 57.

06 WHERE THE MONEY WENT

TURNOVER, LKR MN

SHARE OF LKR 848.48 MN TURNOVER 100%

SAMPATH 154.77 18.2%

MELSTACORP 61.63 7.3%

ACCESS ENG 51.80 6.1%

DIALOG 37.14 4.4%

HNB (X) 31.86 3.8%

Rest of market 511.28 60.3%

YESTERDAY 680.32 +24.7% **YTD DAILY AVG 3,510**

Sampath, Melstacorp and Access Engineering led turnover, and 90% of their LKR 268.20 mn was arranged in three crossings, **28.3%** of the day.

07 MARKET PERFORMANCE

BASES NAMED BELOW

METRIC **20.10** **COMPARED WITH** **CHG %**

AGAINST THE PREVIOUS SESSION, 19.10

All Share Price Index **19,983.78** 20,059.42 **-0.38**

S&P Sri Lanka 20 **5,681.51** 5,700.75 **-0.34**

Market cap, LKR bn **7,224.22** 7,251.09 **-0.37**

Dividend yield, % **3.33** 3.32 **0.30**

AGAINST THE YEAR-TO-DATE DAILY AVERAGE

Turnover, LKR mn **848.48** 3,510.00 **-75.83**

Share volume, mn **30.89** 136.24 **-77.33**

Trades **11,201** 26,670 **-58.00**

TODAY

Foreign purchases, LKR mn **21.42** — —

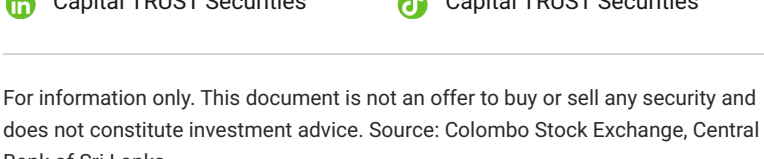
Foreign sales, LKR mn **81.22** — —

Net foreign flow, LKR mn **-59.79** — —

Traded companies **259** — —

08 MOMENTUM AND RATES

NEUTRAL



PRIME LENDING RATE

11.11%

AWPR, week to 16 Oct · CBSL

POLICY RATE

8.75%

OPR, held 30 Sep · CBSL

TREASURY BILL

9.95%

364 day, 14 Oct auction · PDMO

INFLATION

8.00%

CCPI year on year, September · CBSL

MARKET P/E

10.32x

trailing · CSE p1.3

PRICE TO BOOK

1.19x

market · CSE p1.3

09 DIVIDEND CALENDAR

DAYS TO EX-DIVIDEND

GOES EX WITHIN 7 DAYS OF THIS NOTE

CODE **COMPANY** **EX-DIV** **PAYMENT** **TO EX-DIV** **LKR/SHARE**

LION Lion Brewery **20 Oct** 6 Nov **today** **40.30**

LCBF Lanka Credit & Bus. **26 Oct** 12 Nov **+6d** **0.20**

UCAR Union Chemicals **27 Oct** 13 Nov **+7d** **48.00**

ALUM Alumex 9 Oct 21 Oct -11d **0.20**

KVAL Kelani Valley 9 Oct 21 Oct -11d **0.20**

MGT Hayleys Fabric 9 Oct 21 Oct -11d **0.27**

TPL Talawakelle 9 Oct 21 Oct -11d **0.80**

DIPD Dipped Products 9 Oct 22 Oct -11d **0.96**

HAYC Haycarb 9 Oct 22 Oct -11d **1.00**

SINS Singer Sri Lanka 9 Oct 22 Oct -11d **0.34**

ACL ACL Cables 7 Oct 26 Oct -13d **0.60**

HPL Hatton Plantations 14 Oct 2 Nov -6d **1.00**

Days are counted to the ex-dividend date; rows already ex are listed by payment date. Amounts are LKR per share. **As announced in the CSE daily of 20 October 2026.**

10 SECTOR STATISTICS

TURNOVER AND MULTIPLES

INDUSTRY GROUP **TURNOVER** **SHARE** **PER** **PBV** **DY**

BY TURNOVER TODAY, LKR MN

Banks **250.97** 29.6% 4.70 0.74 4.22

Capital goods **118.79** 14.0% 16.80 1.02 2.35

Food beverage & tobacco **117.68** 13.9% 14.19 1.90 4.88

Diversified financials **72.28** 8.5% 7.29 0.74 2.90

Materials **37.75** 4.4% 10.66 1.55 3.19

Telecommunication **37.22** 4.4% 12.44 2.75 4.02

Real estate management **24.00** 2.8% 8.92 1.08 2.25

Retailing **19.82** 2.3% 8.27 1.61 2.08

BEST SECTORS YEAR TO DATE

Telecommunication services **+37%**

Commercial & professional **+14%**

Real estate management **+8%**

Transportation **+2%**

Food beverage & tobacco **-6%**

Banks took 29.6% of the day's turnover, more than half of it Sampath, and capital goods 14.0%. Banks trade on **4.70x** earnings against a market on 10.32x.

11 GLOBAL MARKETS

ASIA-PACIFIC, DAILY AND YTD

MARKET **INDEX** **DAY** **YTD**

FRONTIER, ASIA-PACIFIC

Bangladesh **DSE Broad** **-0.5%** **+11.5%**

Pakistan **Karachi All Share** **0.0%** **-3.6%**

Vietnam **VN Index** **-0.9%** **-5.3%**

Sri Lanka **CSE All Share** **-0.4%** **-11.7%**

EMERGING, ASIA-PACIFIC

Taiwan **Taiwan Weighted** **-0.8%** **+61.3%**

South Korea **KOSPI** **+1.8%** **+36.9%**

Thailand **SET Index** **-0.1%** **+24.8%**

Philippines **PSEI Composite** **+0.3%** **-4.2%**

Malaysia **FTSE Bursa KLCI** **-0.7%** **-5.0%**

China **Dow Jones Shanghai** **+0.1%** **-8.5%**

India **Nifty 50** **-1.1%** **-12.4%**

China **SZSE Component** **+0.1%** **-12.6%**

India **BSE Sensex 30** **-1.2%** **-13.3%**

Indonesia **JSE Composite** **-3.9%** **-42.4%**

DEVELOPED, ASIA-PACIFIC

Japan **Nikkei 225** **+1.6%** **+29.2%**

Singapore **FTSE Singapore** **+0.2%** **+16.1%**

Australia **S&P/ASX 200** **-0.3%** **+1.2%**

New Zealand **NZX 50** **-0.7%** **+0.8%**

Hong Kong **Hang Seng** **-1.3%** **-6.9%**

On the year Sri Lanka is fifteenth of the nineteen markets, at -11.7%, ahead of India's two indices, Shenzhen and Indonesia.

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